Before we get started, let’s log into the training database!
Your usual UR ID and password are all you need!
UR STUDENT SYSTEM

Records & Registration Instructor Led Training

January 2020
Undergraduate Day 1

March 10, 2020
• Welcome, I am X, I am a certified trainer from Eagle Productivity Solutions. We are working in conjunction with the U of R to train you in the features and functions of UR Student.
• Today you will view and work through key registrar-oriented features of UR Student
• Everything we do today will be with undergraduate students, most applicable to you!
• Briefly read down the list to acclimate the participants to the subject matter
Intro to UR Student

- It’s Fast
  - Get quick access to real-time information

- It’s Actionable
  - Take immediate action directly from any report
  - Most all actions and activities in one place
For some functions, there may be times when you will be trained at a later date when those functions are finalized.
We will also have time at the end of this session so you can ask questions.
UR STUDENT NEWSLETTER

WRAPPING UP GO-LIVE PREPARATIONS, vol. 5

This newsletter has been designed to help you prepare for UR Student user activities as the system is prepared for production use. A copy of all UR Student newsletters will be located on the UR Student Project Newsletter page. Our next update will be provided Friday, January 24.

UR STUDENT PROJECT STATUS

- The UR Student cutout window for the February Records / Advising go-live is January 24 through February 18.
- The deadline for any data cleanup in the legacy SSR is 5:45 pm, Thursday, January 23 or the last "picture" of the legacy SSR that will serve as the source of data for the February cutout will be taken early in the morning of Friday, January 24.
- The deadline for wrapping up all Fall 2020 curriculum activity in SSR is 9 pm, Friday, January 24. At that time, this tenant will be frozen and the data will be moved into production. The schools will not have access to UR Student - either in production or SSR - during the cutout window (1/24 through 2/18).
  - The deadline for AS&I Course Administrators was moved up to Wednesday, January 22 to give the AS&I Registrar’s Office a couple of days to work through their review steps before the 1/24 deadline.

PLEASE NOTE: The only administrators working in UR Student are registrars, course administrators, and staff assisting with data cleanup activities. Students, instructors, advisors and other records administrators will cutout starting in February. The Banner’s Office and UR Student Finance personnel will be impacted starting July 2020.

UPDATES

- Curriculum Management activities are on track.
  - There has been more than 5,000 Course definition changes and more than 1,000 Course Section definition changes that have been routed for approval.
  - We experienced a setback this morning when a test Course file was erroneously loaded into SSR; this error impacted roughly 600 courses. The test file was based on SSR data from roughly 4pm on Monday, 1/14. The project team is working collaboratively with the schools and remediating any changes that occurred over the past two days that were accidentally overwritten. Fall 2020 sections were unaffected. The remediation activity is already underway and is expected to be completed over the weekend.
Academic period date controls manage things such as when students can see open classes, enrollment windows, Add/Drop/Withdraw deadlines, grading dates and commencement.

Updates to the academic period date controls will be made through the UR Student project team for the first few academic periods. Changes to these dates are requested through the JIRA service.
Overview of new terms used in UR Student.

- A list of these terms and others with detailed definitions available on UR Student site http://www.rochester.edu/urstudent/student/ has a large set of terms defined that you may find helpful as well.
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<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Window Start</td>
<td>Enrollment for an academic period opens (This is different from enrollment appointments. The Enrollment Window is the overarching period of time that spans the entirety of enrollment appointments for a given period.)</td>
</tr>
<tr>
<td>Faculty Grade Change Deadline</td>
<td>Once associated date rule has been satisfied, final grades can no longer be changed in the system by the instructor or faculty</td>
</tr>
<tr>
<td>Final Grading End</td>
<td>Once associated date rule has been satisfied, final grades are no longer entered into the system by the instructor or faculty</td>
</tr>
<tr>
<td>Final Grading Start</td>
<td>Date when final grades may be entered into the system by the instructor or faculty</td>
</tr>
<tr>
<td>Last Add Date</td>
<td>Once the associated date rule has been satisfied, the Add task is no longer accessible to student</td>
</tr>
<tr>
<td>Last Date to Edit Grading Basis</td>
<td>The date on which the student's request has to be approved prior to persisting data (For ASE Undergraduates only)</td>
</tr>
<tr>
<td>Late Registration Fee Start</td>
<td>Date a fee starts being applied for registering (Only some schools will use this.)</td>
</tr>
</tbody>
</table>
Overview of new terms used in UR Student.

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Example #1 Register A Student

Day One

You are the registrar and tasked to register an undergraduate student for a course.
During the registration process you learn that the course is closed and the student has not been assigned to his class cohort or applied for his upcoming 2020 graduation.
Let’s take a look at how to work through these business processes in UR Student.

Additional training and Mock Registration will be held later this spring.
You will receive additional documentation closer to those events.

UR STUDENT
• I am going to start by showing you where you are going to start out, then we will dive into the system, so watch me for a minute or two and then you can get into the system
• So here we are back at the home page, this should be a familiar sight to most of you
• Our first task today will be to register a student for a course, but with today’s example we know we will have a couple bumps along the way
• We need to know a few things upfront
• Let’s break it down
• The student is – Aaron Pollard
• This is what we know about him
• click
• An undergraduate Senior Business major in the school of arts and sciences
• In the class of 2020
• He wants to add Studio Art to his schedule
• Click
• What business processes do we need to tackle?
• Obviously- course registration, but what else
• Click
• We will register him, but the course is closed, we will see how easy it will be to override this function
• Additionally- we will change his program of study to reflect his business major BBS
• Since he is in the class of 2020, let’s make sure he is attached to that cohort, if not, add him to it.
• Add and remove an advising hold
• Let’s start with getting him registered for the course first
Before you dive into the system
Let me show you a couple of things to get you started, these will probably be reminders for many of you
Point to search bar
The search bar and the applications icons get you to the functions you will need daily
If you type in “Register” in the search bar
“Register Student for Course” will pop up and bring you this page
Once you are in the system
You will fill in the required fields
State date: future periods: you can type it in or select the academic unit and semester
Select the course with section number
And finally type in the student name
Now it’s your turn
• Students have a Drop button on their Current Courses screen. Their ability to drop a course adheres to any limitations set for the student’s aligned groups.
• There will be more training on this in the Fall when we begin registration in UR Student.
• Just as a Registrar can register a student for a course, a Registrar can drop a student from a course as well at any time, regardless of time frame. When the Registrars drops a student, their process does not adhere to the student rules.
• The Withdraw button only appears until the Withdraw deadline. After that deadline, you grade the course as a W.
• Simple process:
  • In search, Drop Student
  • Click Drop Student from Course
  • Complete the 3 fields
  • Click OK and done
• Just as you can register a student for a course, you can drop a student from a course as well.

• Simple process:
  • In search, Drop Student
  • Click Drop Student from Course
  • Complete the 3 fields
  • Click OK and done
• Just as you can register a student for a course, you can withdraw a student from a course as well.
• Simple process:
  • In search, withdraw Student
  • Click withdraw Student from Course
  • Complete the 3 fields
  • Click OK and done
[Exercise slide – emulator #1]
Register student for closed course
Drop/Withdraw student from a course
Drop – within deadline
Withdraw – beyond deadline
• Let’s keep moving with Aaron’s record and make some changes
• To go into a student record we can do it a couple of ways
• We can use the search bar, and search –
• THE BEST WAY IS (for now) is “find students + N1196” report number makes it easy to find
• Or go on the UR Home Page, you can go into the registrars and records administrators application
• Click
• You can access your applications from your home page
• Applications are customized by the user’s role
• And provide access to the necessary functions and reports
• When you click on the application, you should see something like this
• Keep in mind, your view may differ from mine, I am in a training environment, but the basics are the same.
• BEST PRACTICE: Always use Find Students URSTU N1196 to find a student – this gives you more information about the students than any other report!
• The best thing about this report is you can search for a student by name or by their student ID – it’s new in UR Student and a big help for you!
• Trainer point to the two search bars
• In the lower search bar type the name of the student you are seeking to register
• You can search by ID number or use the Faceted Search to narrow your results
• Now, you try, can you get to Aaron Pollard’s student page?
• I will give you a minute
• .
[Exercise slide – emulator #2]

View student attributes
Add student to cohort
Change POS
• Using the table above:
• Each academic unit applies different types of holds.
• These holds are named different things in each location: Advisor hold, Title IX Hold, Academic Honesty Hold, Program 1 Hold, and so on
• AS&E has 15 different types of holds, they use holds for:
  • Full registration
  • Diplomas and
  • Transcripts
• Eastman Schools holds are used to hold Full Registration or hold transcripts
• School of Nursing has 15 types of holds that place holds on Full registration
• U of R has 12 different types of holds that place holds on Full registration, financial aid, diplomas & transcripts
• While the holds in the different academic may be used differently, the overall process of applying and removing holds is basically the same.

Trainer Note: the functionality to do mass removal of holds is not yet available in UR Student. If it is required to remove a large group of holds, contact the UR Student support team.

**IMPORTANT: Do not Add/Remove Holds in UR Student until the last week of August – or until provided with more information**

• Let’s go back into the system and take a look
[Exercise slide – emulator #3]

Apply/Remove Holds
• We’re going over this to show you what the process could look like. We will be providing more training in the Fall 2020 about the specific steps your school may choose to take for the graduation/program completion process.

• Remember our student is a senior and plans on graduating this spring
• At this time in UR Student, the registrars set the students graduation completion processes
• Different processes and how to use this in different schools
• Referred to as Manage Program Completion
• Let me show you what you will see
• From the home page type in the search bar “Manage Program Completion”
• The first screen will pop up
• You will need to fill in all the required fields
• The student’s academic unit
• Academic level
• Click OK
• Select a student or select all students (left screen shows selecting ALL students)
• Click
• Select update completion status
• Select applied for completion
• Click OK
• Now it is your turn
[Exercise slide – emulator #4]

Manage Program Completion
There will be additional training for school-specific transfer credit processes during the April 2020 timeframe.

Example #2 Transfer and Exam Credits

Day One

Example #2

- A student recently transferred from another educational institution into Arts, Science & Engineering
- What do their external records look like in UR Student and how is credit awarded?
No set business process for transferring in external credits;

What you will see today is a preview of the transcript and transfer credit process. Later you will get more in-depth training directly from Sean Hanna on the steps and considerations for this process.

It is a 3-step business process

- You add the Educational Institution, if it’s not already there
- Add the External Transcript to their UR Student record
- Then assign the transfer credits in their record
Example 2: View Student Record with Transfer and Exam Credits

- UR Exam Credits all converted as Transfer Credits

- Information needed:
  - Academic Unit
  - Academic Period
  - Student Name
  - External Educational Institution

- All previous UR Exam and Transfer Credit converted from the old system as transfer credits – whether an exam or transfer credit

- Questions to be answered:
  - Look at students’ transfer credit
  - Run report by school
  - Then filter info
This is an FYI: To access the Transfer Validation report type “5121” into the search bar (We are not going to show this in the emulator)

- Click the link
- Once you click the link, you can filter using the following information:
  - Academic Unit
  - Academic Period
  - Student
  - Educational Institution

- Great report to find students with transfer and/or exam credit
- Report has no required fields but can filter to multiple years if wanted
- Trainer Note: the report shown on the screen was run without specifying any of the filters – so “wide open,” and shows multiple AUs and other broad information. Usually would not run it like this – done this way because in the training environment, there wasn’t much/any data per school that was easily filtered.
• No set business process for transferring in external credits;
• Must first add the external transcript then add the external credits
• Only awarded credits will appear
• Use External Records to see the transfer records – what institutions or exams
• Use Transfer Credits to see the details of the transferred credits or exams
• Academic History will also show the timeline/credits awarded
[Exercise slide – emulator #5

View transcripts and external records
We will discuss the specifics of creating a transcript from UR Student closer to the time that we will be producing them from the new system.

Trainer Note: Please communicate this to the participants: Official Transcripts are being worked on in collaboration with Workday and UR Student has requested significant changes to how the Transcript process itself works. Once it is delivered as we have requested, we will ensure that you receive the updated training. (This note is also in the emulator)

Transcripts will continue to be handled in SIS until end of Summer 2020.
Unofficial transcripts cannot be printed on “official” transcript paper
Cannot also say “official” anywhere on them
PDF displayed on screen; can download or print from there

Trainer Notes: Official Transcripts still being worked on for UR Student, will be produced from SIS until the end of summer.
[Exercise slide – emulator #6

Generate Unofficial Transcript]
Trainer Note: no need to read through this slide – “reminding you, please take a moment to read the slide and remember what you put in Notes is available for the student to see. For more information, visit the Policies & Procedures page.”

- *(PII= Personally Identifiable Information)*
- We also need to acknowledge the Family Educational Rights and privacy act as it relates to student records
- New hires will be required to acknowledge understanding of FERPA guidelines

Trainer: Read the first four bullets on slide

- Consent requirement has exceptions noted below:
- Directory information
- Information can be shared with a school official who has legitimate educational interest
- Information can be shared w/ parents w/o consent if student is claimed as tax dependent
- And finally information can be shared with anyone in a health / safety emergency
- Go to the UR Website for further information: more comprehensive details of FERPA
As a Registrar you can add notes into a student record at any time.

You can add notes into the academic record or notes in their advising record.

It is a very simple process, you just need to know the correct business process.

Here’s how.

*Trainer Note: Transcript notes will be deferred until Official Transcripts are ready for training.*
• Both academic and advising notes are filled in the same
• For academic record notes – search “add academic record note”
• For advising notes- search “add advising notes”
• Then fill in the required information marked with an asterisk
• **Note the notes are for internal use only, whether they are marked public or private. They are not for students to read.**
• When marked private, only personnel w/ the proper access will be able to see the record.
• The Reporting team has done a great job with these reports, making it much easier to review notes.
• Can see all the comments in one location
Exercise slide – emulator #7

FERPA

Adding Academic Advising Notes and Academic Record Notes

Useful Notes Reports
Just to recap what has been covered in Day 1. A lot of information has been shared. Luckily there will be many resources to help you when this all goes live.

As we said at the beginning, for some of the functions, you will receive more training and materials as we get closer to specific cut over dates in the coming months.
Day 1 Questions?
Resources

Practical Application
- Seek & Find Activity

Post-Training
- Participant Guide
- Quick Reference Cards
- Quick Reference Videos
- UR Student website – Need HELP?
  - https://tech.rochester.edu/services/urstudent
- In-Person Support at Gleason Theater, River Campus until April 2020
Next Steps

- Day Two Training
  - Student Schedules
  - Troubleshooting registration issues
  - Graduation Completion Process
  - Lapse, Incomplete, Missing Grades
  - Supplemental Activity
    - Seek and Find
- GO LIVE FEB 17, 2020
- Data Clean Up
- Updates in UR Student Newsletter
- Spring 2020/Summer 2020 registration using current online registration tool
  - First time for UR Student registration Fall 2020
- Transcripts issued out of SIS until August 2020
• Welcome, I am X, I am a certified trainer from Eagle Productivity Solutions. We are working in conjunction with the U of R to train you in the features and functions of UR Student.
• Today you will view basic navigation and dashboard as well as key features of UR Student
Trainer note: read slide
Review of Day 1

- View Key Student Attributes
- View/Add/Change/Remove POS
- Add to Cohort
- Change Student Record
- Drop/Withdraw Student
- Student Holds
- Apply for Graduation
- Transcripts and Transfer Credits
- Unofficial Transcript Requests
- Academic and Advising Notes
Elayne Stewart is going to walk us through a brief demo to show you how a student will be creating their schedule and how they can view courses they may wish to take.

Additional materials will be available and provided to you about the end of February/beginning of March.
Planning for a Mock Registration Event – to practice registration prior to going live with registration for the Fall 2020 term in April.

More details and materials will be coming your way before the end of February!
The troubleshooting console lets registrars look into why a student cannot register for a course. Fill in as much or as little information as necessary.

The registrars need an understanding of the troubleshooting console to help them figure out why a student couldn’t get into a class. That’s how this console comes into play — Registrars can’t see exactly what the student sees but they can look at this and see what might be the problem.

The console goes through every possible iteration and issue of why a student might have difficulty getting into a class.
Students can also see troubleshooting information – in a different format but the same as what the registrar can see.

Access from a troubleshooting button.
Example #1 Approve for Completion & Confer Degree

Day Two

- It is the middle of Spring 2020, and you need to complete the graduation process for students and subsequently confer degrees.
- Let’s take a look at how to work through these business processes in UR Student.
• Reminder that we will be back with additional training before you need to begin these processes. This portion is just to show you what is possible.
• These are the business process that need to take place to get a student ready for graduation
• On day 1- we applied for completion, now we will go into someone’s record to update the program completion status
[Emulator #8
Approval for completion/ confer degree
• We will be covering Grading and Graduation with additional training during the Fall 2020 term. You will not be completing these tasks until the end of Fall 2020. This just gives you a quick view of the available reports.

• If you need to run different grading reports, this is done through the search bar as well
• Let’s see if we can find these grading reports
Grading reports
• Elayne will demo the process in SASS and in UR Student.

• This is usually used for non-matriculated, visiting, post-baccalaureate pre-med and some Eastman Institute Students.

• You will need a valid NETID/password to access SASS.

• Most students will be added directly into UR Student through integration from the school’s admission application.

• Let’s add a new student using SASS
Example #3: Enter Non Matriculated Application for Graduate Student - SASS

- Used for non-matriculated, visiting, post-baccalaureate pre-med and some Eastman Institute students
- Student entered into SASS, then interfaced into UR Student
- Application triggers student onboarding
- Registrar can then register student for courses
  - Show can complete in one action

SASS application typically happens during the summer semester
SASS: Add Non Matriculated Application for Graduate Student

- Academic Unit
- Academic Level
- Application Source
- Application Date
- Application Type
- Anticipated Load Status
- Program of Study
- Entry Term

- First Name, Last Name
- Date of Birth
- Gender
- SSN (highly encouraged if available) useful for identity resolution
- Country of Citizenship
- Street address
- Telephone
- Email Address
- Emergency Contact details
SASS: Add Non Matriculated Application for Graduate Student

- Submitting the Application
  - When ready to submit the application for processing, click **Submit**
  - You will get a confirmation message saying the application has been submitted successfully

- After Saving or Submitting
  - Once the application is saved, Date of Birth or SSN not visible
  - You can update those values
  - Data encrypted for security reasons
- Application Status changes to **Ready for IdM**, then **Sent to IDM**
SASS: Add Non Matriculated Application for Graduate Student

- IdM Resolution
  - System tries to match the Student ID to an existing URID
  - If no ID found, creates a new ID automatically
  - Formats the UR Student Application ID:
    - Ex: SASS_213_40085197
      - 213 – application ID assigned in SASS
      - 40085197 – URID assigned to student
SASS: Add Non Matriculated Application for Graduate Student

- **IdM Resolution Complete**
  - After IdM Resolution completes,
  - Application Status becomes **Sent to UR Student**
- **Integration to UR Student**
  - To create student’s Academic Record
- **Error messages**
  - Application Status Message indicates errors, if any:
    - The POS is not valid in UR Student (setup error only)
    - The Street Address is not valid address format for the country indicated
    - The Telephone Number is not valid telephone format for the country indicated
  - Use Submission List to find, correct and resubmit
Continue adding address and contact information for this application

- Street address
- Telephone
- Email Address
- Emergency Contact Details

Then press Save

The system saves the information with an Application Status of Draft. You receive a message that the top indicating the Save was successful.
Continue adding address and contact information for this application
- Street address
- Telephone
- Email Address
- Emergency Contact Details

Then press Save

The system saves the information with an Application Status of **Draft**. You receive a message that the top indicating the Save was successful.
[Exercise slide – emulator #10]

Add New Student using SASS
Here’s where we’ve been today!
Questions?
Resources

Practical Application
- Seek & Find Activity
do it next week

Post-Training
- Participant Guide
- Quick Reference Cards
- Quick Reference Videos
- UR Student website – Need HELP?
  - [https://tech.Rochester.edu/services/urstudent](https://tech.Rochester.edu/services/urstudent)
- In-Person Support at Gleason
  Theater, River Campus until April
  2020

UR STUDENT
Next Steps

- GO LIVE FEB 17, 2020
- Data Clean Up
- Updates in Newsletter
- Registration for Spring 2020/Summer 2020 using current (existing) Online Registration
  - Registration in UR Student for Fall 2020
- Transcripts from SIS until August 2020